File Exchange
Instructions

Overview

The Mayolo & Associates LLC's Client Portal Access (NetClient CS) provides you with a convenient, fast, and secure way of transferring files to and from our office online. Any file type can be placed in your client portal, including: extremely large QuickBooks Backup Files, Microsoft Word Documents, PDF Documents, and Excel Spreadsheets.

The following instructions will get you set up and transferring files in no time.

First – Log into your Client Portal (NetClient CS)

In order to log into your Client Portal, go to the Mayolo & Associates LLC website (www.mayolocpa.com), locate the Client Portal Access on the right hand side, then insert your Username and Password.

Please click the ("Forgot your password?) if you do not remember your password and follow the instructions. If you are still having difficulties, please call 724-439-3455 for assistance.
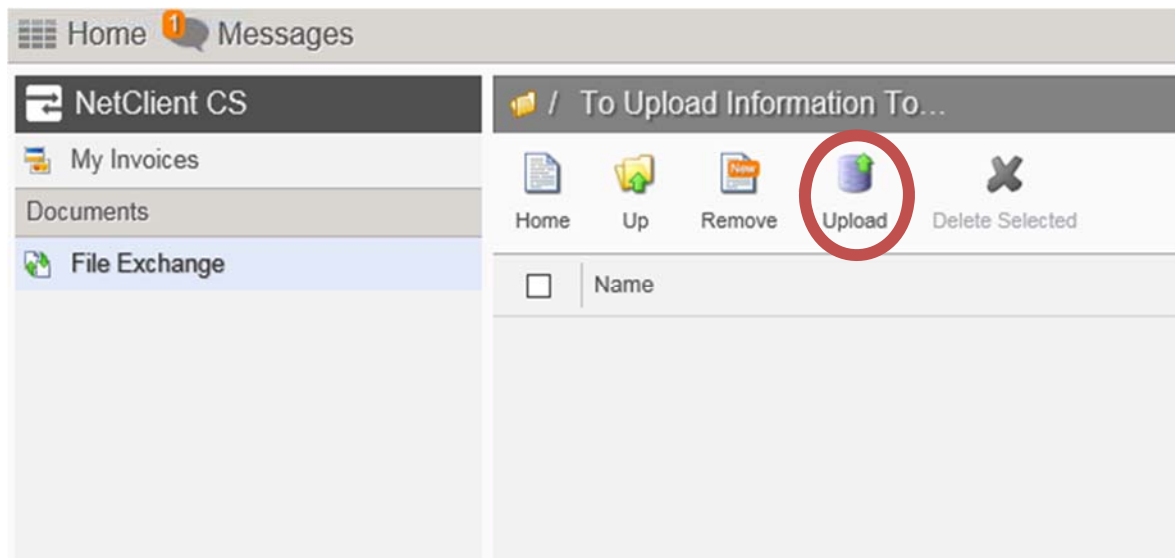
Second – Go to File Exchange

On the left side of your Client Portal, under the Documents Section, you will see File Exchange. File Exchange is a simple way to upload and download files. To upload files, click on **File Exchange**
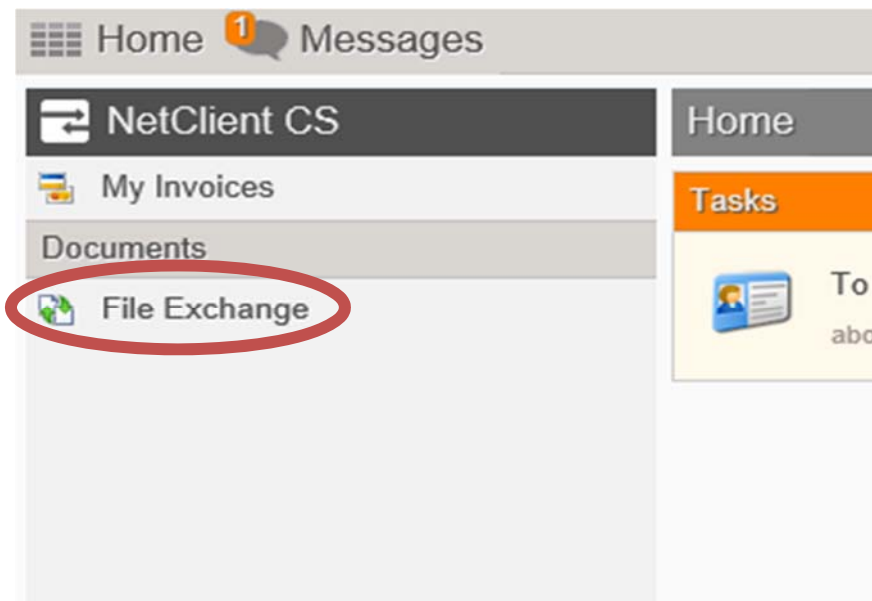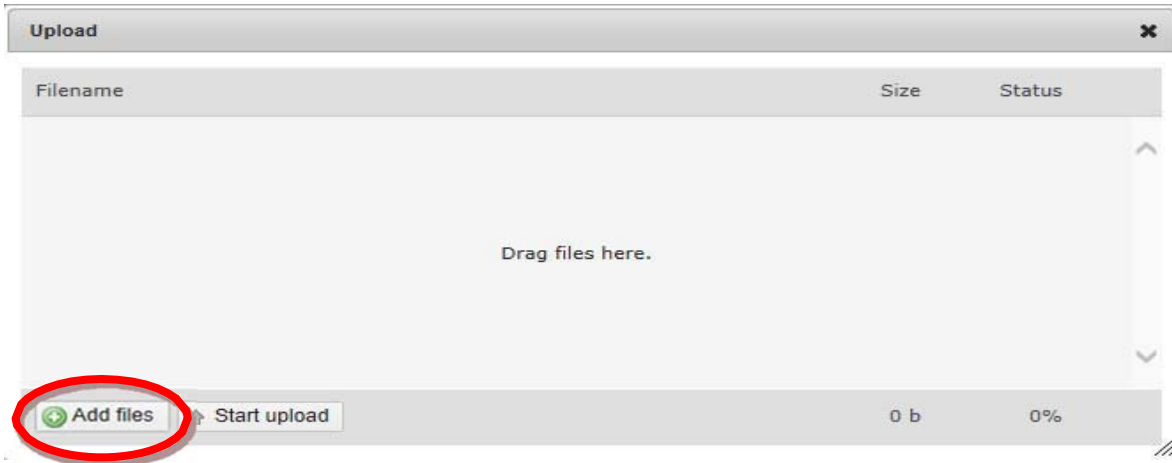
Then click the **"To Upload Information To Mayolo & Associates"** folder.
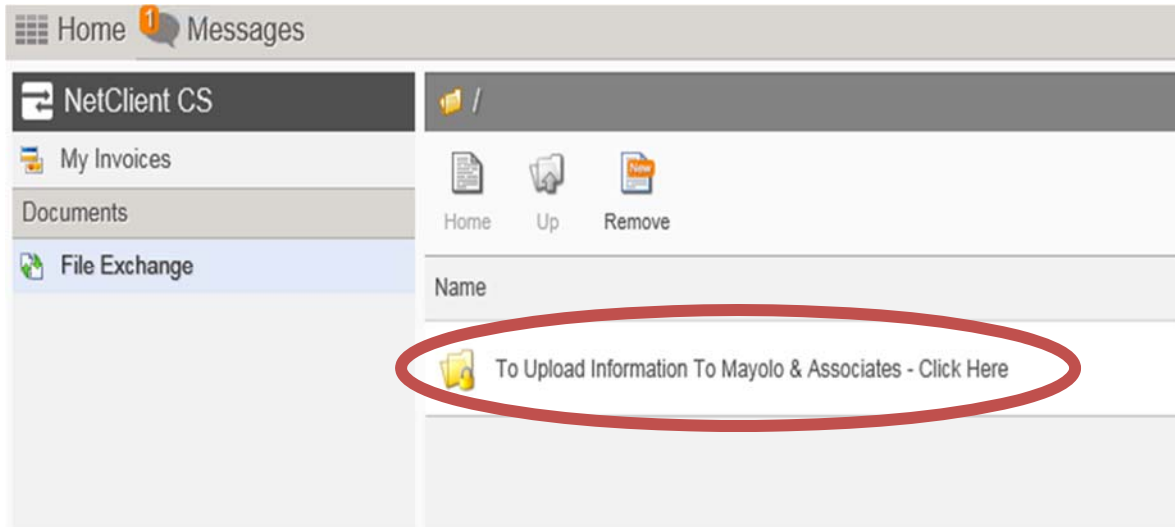

Click on **Upload**.

Then click on **Add files**.

Browse your computer for the file you want to upload. Select the file(s) by clicking on them once.
They will appear highlighted and then click **open**. Again, this can be a pdf file you scanned into your
C:Drive, and Excel Spreadsheet, Word Document or Quickbooks file, etc.
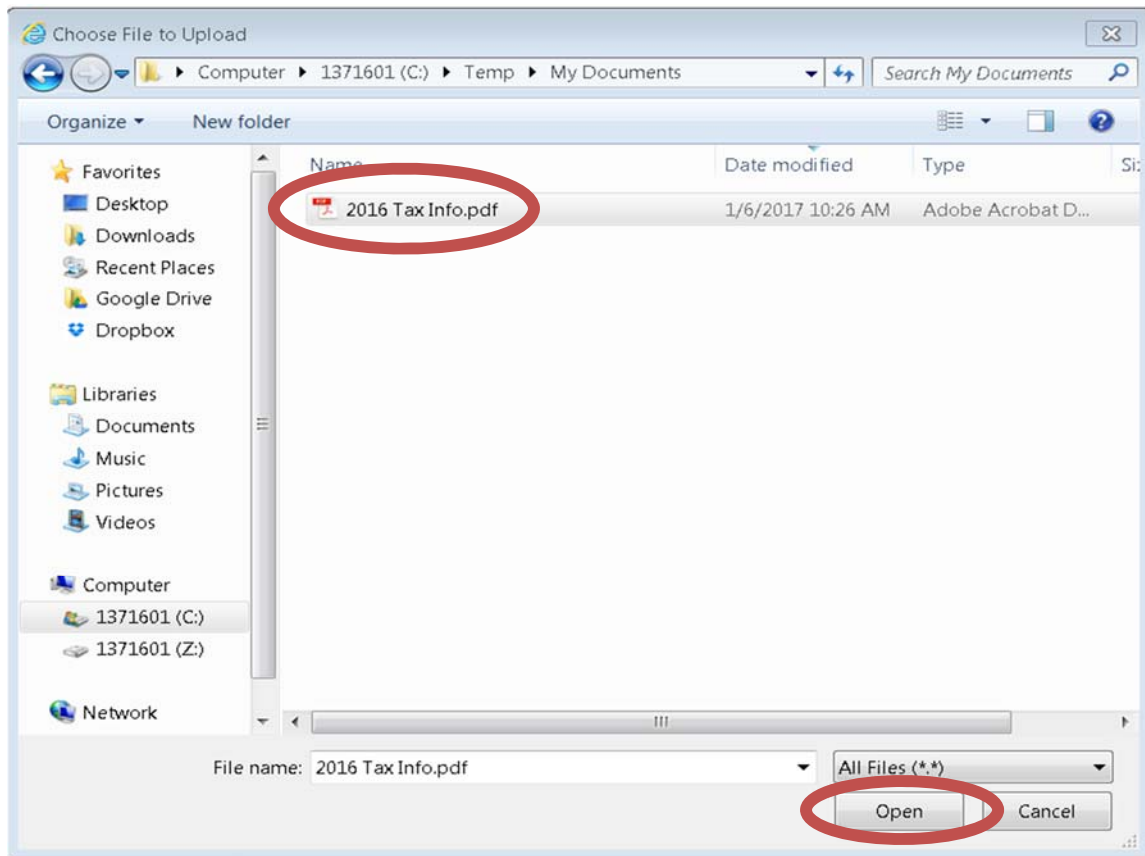
It will appear in the upload window. Once you have selected all the files you wish to upload, click **Start upload**.
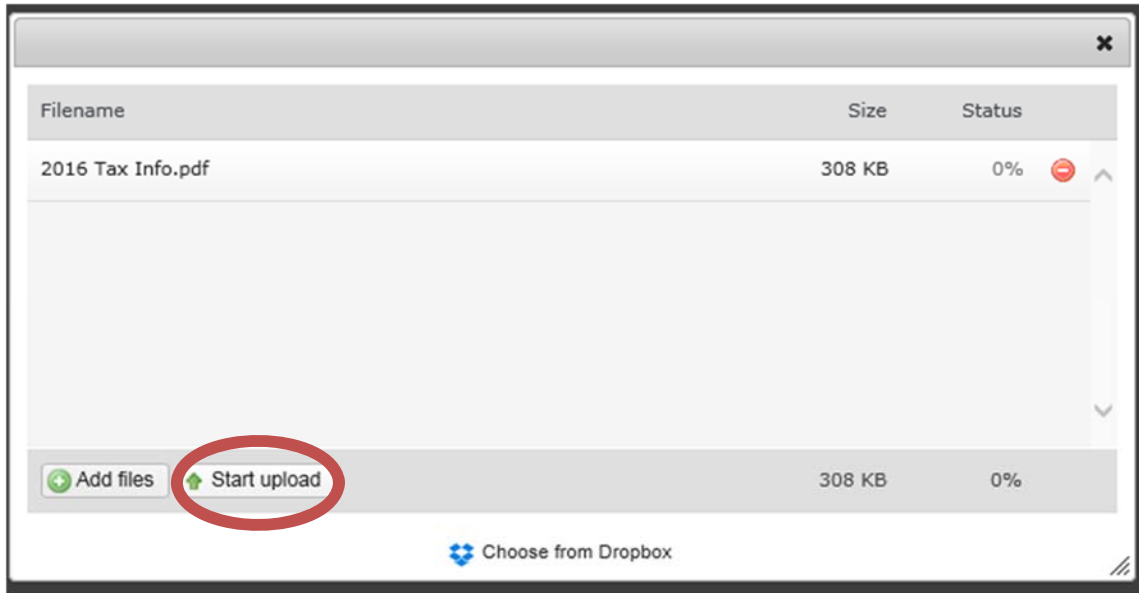
The file(s) should now appear in the "File Exchange Folder" of your Client Portal (NetClient CS). Mayolo & Associates LLC will now have access to those files.

Deleting files from File Exchange

If you need to delete a file, select the file by **checking the box** to the left of the file name and then click on **Delete Selected**.
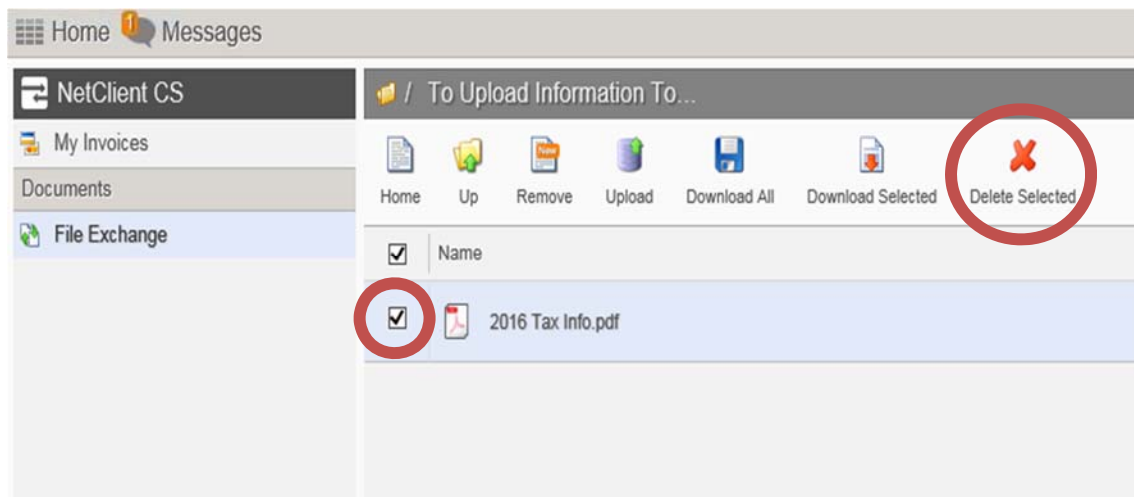
Downloading Files from File Exchange

To **Download** files from your Client Portal (NetClient CS), simply **check the box** in front of the file(s) you wish to download, then select **Download Selected** or **Download All**. Select Save as and choose where on your computer you wish to save the file. If you would like to view the file without downloading it, simply click on the file name and it will open.
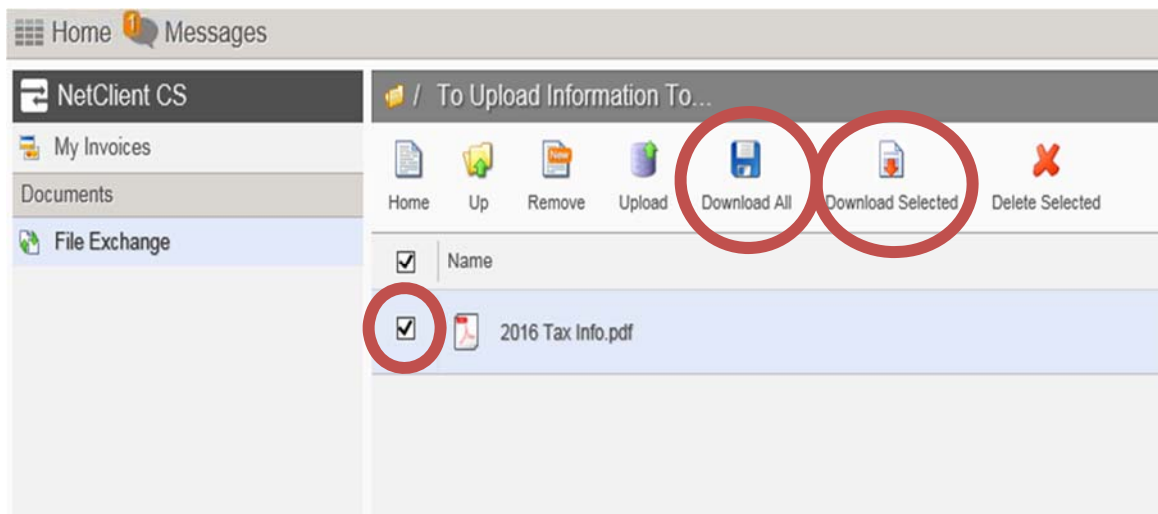
Note: All file exchange files will automatically be deleted from the portal after 15 days.

Logging out of your Client Portal

To log out of your Client Portal, click on your name in the top right corner and then select Log Out.